

# FY17 CDS Report Listing - Brief Description

Report Name	Brief Description
001 - HCP Active Care Coordination Clients	Report 001 is a list of your agency's <u>Active</u> care coordination clients. There is no date range for this report, so it is always a current list of all active cases.
002 - HCP County Public Health Data	Report 002 is a listing of your agency's new client registrations made in CDS within the date range identified.
003 - HCP Care Coordination Activity	Report 003 is a snapshot of your agency's caseload activity within the report date range activity. It contains only a high level summary of HCP activities that have occurred within the date range.
007 - HCP Client Count In Report Period	Report 007 is a client listing of all active and in-activated <u>ed</u> clients within the report date range.
010 - HCP Client Transfers In Report Period	Report 010 is a client listing of all case transfers for your agency within the report date range identified. This report includes both cases transferred out of your agency and cases transferred into your agency.
011 - HCP Medical Conditions - Detail Listing	Report 011 is a list of all medical conditions reported for your agency's <u>Active</u> Care Coordination clients within the report date range identified.
012 - HCP Medical Conditions - LPHA Summary	Report 012 is a graphical representation of the medical conditions reported for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u> .
013 - HCP Medical Conditions - State Summary	Report 013 is a graphical representation of the medical conditions reported for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u> .
014 - HCP Information Only Requests	Report 014 is a summary list of all of the Information Only encounters that have been entered into your agency within the report date range identified.
021 - HCP Social Determinants of Health - Agency Summary	Report 021 is a summary report of all Social Determinants of Health (SDoH) information that has been entered into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u> .
022 - HCP Social Determinants of Health - State Summary	Report 022 is a summary report of all Social Determinants of Health (SDoH) information that has been entered into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u> .

# FY17 CDS Report Listing - Brief Description

Report Name	Brief Description
023 - HCP Intake Interview-Agency Summary	Report 023 is a summary report of all Intake Interviews that have been entered and submitted into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u> .
024 - HCP Intake Interview - State Summary	Report 024 is a summary report of all Intake Interviews that have been entered and submitted into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u> .
025 - HCP Client Demographics-Agency Summary	Report 025 is a summary report of Client Demographics for HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u> .
026 - HCP Client Demographics - State Summary	Report 026 is a summary report of Client Demographics for HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u> .
102 - HCP Care Coordination Clients Served	Report 102 is a summary report of all HCP Care Coordination <u>Clients served</u> within the report date range identified.
<b>SPECIALTY CLINIC REPORTS</b>	
201 - HCP Specialty Clinic Schedule	Report 201 provides a clinic schedule, by time slot, for clients who are to be seen at a given specialty clinic within the report date range identified.
202 - HCP Specialty Clinic Triage Listing	Report 202 is a summary report of all HCP Specialty Clinic Clients who are currently being seen at a given specialty clinic location for a given specialty. There is no date range for this report, so it is always a current list of all active clients who have not been discharged.
203 - HCP Specialty Clinic Visit Record	Report 203 provides a PDF of the client's Visit Record for each client who has a specialty clinic appointment scheduled within the report date range identified.
204 - HCP Specialty Clinic Medical History	Report 204 provides a Medical History form for each client who has a specialty clinic appointment scheduled within the report date range identified. The Medical History form should be completed by families upon check-in for their appointment.
205 - HCP Specialty Clinic Appointment	Report 205 provides an Appointment Reminder Letter for each client who has a specialty clinic appointment scheduled within the report date range identified.

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
001 - HCP Active Care Coordination Clients	<p>Report 001 is a list of your agency's <u>Active</u> care coordination clients. There is no date range for this report, so it is always a current list of all active cases.</p> <p>Report 001 contains the following:</p> <ul style="list-style-type: none"> <li>• All demographic information (including Name, DOB, ID, Gender, Registration Date, Language, Primary Contact, Address, Contact Information, and Insurance)</li> <li>• Care Coordinator name</li> <li>• Most recent: Intake Interview completion date, Assessment completion date, Assessment review date, Shared Plan of Care completion date, Shared Plan of Care review date, Six Month Review Due Date.</li> <li>• "Six Month Review Due Date" will be projected for you based on the date of the last Assessment or Assessment Review. If the Six Month Review is <i>past due</i>, the report will indicate that it is past due.</li> <li>• Medical Conditions check box - this box will be checked if medical conditions have been entered for a client</li> <li>• Social Determinants of Health - this box will be checked if Social Determinants of Health has been entered for a client</li> </ul> <p><i>Monitoring: Use this report to monitor individual client progression through the HCP Care Coordination Model. Clients will progress through the model at differing rates, but there should be a clear progression demonstrated through the completion dates of the various care coordination activities. If a client does not have completion dates for various care coordination activities and/or progression through the model is not occurring, the care coordinator should re-assess barriers and adjust the action plan accordingly. If you have clients included on this report that you are not actively working with, and thus there are gaps in completion dates, you should inactivate the client. This report should be run monthly.</i></p>
002 - HCP County Public Health Data	<p>Report 002 is a listing of your agency's new client registrations made in CDS within the date range identified.</p> <p>Report 002 contains the following:</p> <ul style="list-style-type: none"> <li>• Client Name</li> <li>• Client DOB</li> <li>• Gender</li> <li>• ID</li> <li>• Hispanic Ethnicity (yes/no)</li> <li>• Primary Contact <ul style="list-style-type: none"> <li>○ Last name, First name</li> <li>○ Contact Type (cell phone, home phone, e-mail)</li> <li>○ Contact</li> <li>○ Address</li> </ul> </li> </ul>

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
003 - HCP Care Coordination Activity	<p>Report 003 is a snapshot of your agency's caseload activity within the report date range activity. It contains only a high level summary of HCP activities that have occurred within the date range.</p> <p>Report 003 contains the following:</p> <ul style="list-style-type: none"> <li>• The number of clients Inactivated or Activated</li> <li>• The number of Information Only encounters (by Agency)</li> <li>• The number of Intake Interviews completed, Assessments completed, Assessments reviewed, Shared Plans of Care completed, Shared Plans of Care reviewed, and Six Month Reviews Past Due <ul style="list-style-type: none"> <li>○ <i>Please note: Because a given client can have multiple Assessments or Plans of Care (or multiple reviews) completed within the report period, the number of active clients (or "N") may not equal the number of activities shown on this report. Additionally, this report will not match the number of clients reported on Report 102, column "F1" or column "G1".</i></li> </ul> </li> </ul> <p><i>Monitoring: Use this report to monitor HCP Care Coordinator Activities that have been completed within a specific time frame. These totals should be reflective of the total FTE that the Care Coordinator has dedicated to HCP. For example, if Report 003 was ran for a 1 month period and you have a total of 1 full time FTE dedicated to HCP, we would expect the total activities for the month to be reflective of 128-160 hours of work. If your agency has taken on a "consultative role" in your county, in which care coordination activities have been taken on by another agency in your community, but you serve as a resource and to "coordinate the care coordinators", we would expect these activities to be reflected in the Information Only column of this report. This report should be ran monthly.</i></p>
007 - HCP Client Count In Report Period	<p>Report 007 is a client listing of all active and in-activated clients within the report date range.</p> <p>Report 007 contains the following:</p> <ul style="list-style-type: none"> <li>• Client Name, DOB, Registration Date, Status as of the last day of the report period (Active or In-activated), and Inactivation Dale (if applicable)</li> </ul> <p><i>Please note: This report includes clients regardless of HCP activities completed in CDS. Therefore, the sum of clients on report 007 will not match the number of clients reported on reports that are specific only to "clients served", such as report 102.</i></p>
010 - HCP Client Transfers In Report Period	<p>Report 010 is a client listing of all case transfers for your agency within the report date range identified. This report includes both cases transferred out of your agency and cases transferred into your agency. The report includes Client Name, DOB, ID, Registration Date, Status (active or inactive), Transferred To, Transferred From, and Transfer Requested By.</p>

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
011 - HCP Medical Conditions - Detail Listing	Report 011 is a list of all medical conditions reported for your agency's <u>Active Care Coordination</u> clients within the report date range identified. There is no limit to the number of medical conditions being reported; all medical conditions entered in CDS, per client, will be listed in alphabetical order. Individual medical conditions are limited to 50 characters each and each medical condition is separated by an * symbol.
012 - HCP Medical Conditions - LPHA Summary	<p>Report 012 is a graphical representation of the medical conditions reported for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u>.</p> <p>Report 012 contains the following:</p> <ul style="list-style-type: none"> <li>• The total number of clients served for the date range identified</li> <li>• The total number of clients served with a reported medical condition for the date range identified</li> <li>• The total number of medical conditions reported for the date range identified <ul style="list-style-type: none"> <li>○ <i>Please note: Individual clients are not limited to one medical condition; therefore, the number of clients will not equal the number of medical conditions reported</i></li> </ul> </li> <li>• Blue Bars represent Number of Clients with the given medical condition</li> <li>• Orange Bars represent the Percentage of Total Medical Conditions that the given medical condition comprises. For example, if a total of 50 medical conditions are reported and 5 children are diagnosed with Asthma, then Asthma would comprise 10% (5/50) of the medical conditions reported in the state for the report date range identified.</li> </ul>
013 - HCP Medical Conditions - State Summary	<p>Report 013 is a graphical representation of the medical conditions reported for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u>.</p> <p>Report 013 contains the following:</p> <ul style="list-style-type: none"> <li>• The total number of clients served for the date range identified</li> <li>• The total number of clients served with a reported medical condition for the date range identified</li> <li>• The total number of medical conditions reported for the date range identified <ul style="list-style-type: none"> <li>○ <i>Please note: Individual clients are not limited to one medical condition; therefore, the number of clients will not equal the number of medical conditions reported</i></li> </ul> </li> <li>• Blue Bars represent Number of Clients with the given medical condition</li> <li>• Orange Bars represent the Percentage of Total Medical Conditions that the given medical condition comprises. For example, if a total of 50 medical conditions are reported and 5 children are diagnosed with Asthma, then Asthma would comprise 10% (5/50) of the medical conditions reported in the state for the report date range identified.</li> </ul>

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
014 - HCP Information Only Requests	<p>Report 014 is a summary list of all of the Information Only encounters that have been entered into your agency within the report date range identified. The report will indicate the total number of encounters that were entered, as well as a count of each answer given for each question. Next to the “count” of each answer given, there is a percentage of information only encounters that reported a given response.</p> <p><i>Please note that it is not required that you obtain an answer to each question for every information only encounter. Therefore, the data contained in this report may not be a true representation of the entire population being served by your agency and is only as accurate and complete as the data your agency has entered in to CDS.</i></p>
021 - HCP Social Determinants of Health - Agency Summary	<p>Report 021 is a summary report of all Social Determinants of Health (SDoH) information that has been entered into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>Agency</u>.</p> <p>Report 021 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of clients served within the report date range</li> <li>• Total number of responses to each of the 7 SDoH questions</li> <li>• Total number of responses to each answer category, per question</li> <li>• Percentage breakdown of each answer category, per question</li> <li>• Federal Percent Poverty breakdown</li> <li>• Graphical Representation of Federal Percent Poverty breakdown</li> </ul>
022 - HCP Social Determinants of Health - State Summary	<p>Report 022 is a summary report of all Social Determinants of Health (SDoH) information that has been entered into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u>.</p> <p>Report 022 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of clients served within the report date range</li> <li>• Total number of responses to each of the 7 SDoH questions</li> <li>• Total number of responses to each answer category, per question</li> <li>• Percentage breakdown of each answer category, per question</li> <li>• Federal Percent Poverty breakdown</li> <li>• Graphical Representation of Federal Percent Poverty breakdown</li> </ul>

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
023 - HCP Intake Interview- Agency Summary	<p>Report 023 is a summary report of all Intake Interviews that have been entered and submitted into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u>.</p> <p>Report 023 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of <u>clients served</u> within the report date range</li> <li>• Total number of responses to each of the 17 Intake Interview questions, method of contact, and referral source</li> <li>• Total number of responses to each answer category, per question</li> <li>• Percentage breakdown of each answer category, per question</li> </ul>
024 - HCP Intake Interview - State Summary	<p>Report 024 is a summary report of all Intake Interviews that have been entered and submitted into CDS for all HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u>.</p> <p>Report 024 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of <u>clients served</u> within the report date range</li> <li>• Total number of responses to each of the 17 Intake Interview questions, method of contact, and referral source</li> <li>• Total number of responses to each answer category, per question</li> <li>• Percentage breakdown of each answer category, per question</li> </ul>
025 - HCP Client Demographics- Agency Summary	<p>Report 025 is a summary report of Client Demographics for HCP Care Coordination <u>Clients served</u> within the report date range identified for your <u>agency</u>.</p> <p>Report 025 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of <u>clients served</u> within the report date range</li> <li>• Average Age of Clients, with age breakdown by year</li> <li>• Average Length of Time in Care Coordination, with breakdown by year</li> <li>• Total number of responses and percentage breakdown for the following: <ul style="list-style-type: none"> <li>○ Legal Guardian</li> <li>○ Language Spoken in Household (primary)</li> <li>○ Interpreter Needed</li> </ul> </li> <li>• Insurance Type, with Medicaid breakdown by sub-type</li> </ul>



# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
026 - HCP Client Demographics - State Summary	<p>Report 026 is a summary report of Client Demographics for HCP Care Coordination <u>Clients served</u> within the report date range identified for clients <u>statewide</u>.</p> <p>Report 026 contains the following:</p> <ul style="list-style-type: none"> <li>• Total number of <u>clients served</u> within the report date range</li> <li>• Average Age of Clients, with age breakdown by year</li> <li>• Average Length of Time in Care Coordination, with breakdown by year</li> <li>• Total number of responses and percentage breakdown for the following: <ul style="list-style-type: none"> <li>○ Legal Guardian</li> <li>○ Language Spoken in Household (primary)</li> <li>○ Interpreter Needed</li> </ul> </li> <li>• Insurance Type, with Medicaid breakdown by sub-type</li> </ul>
102 - HCP Care Coordination Clients Served	<p>Report 102 is a summary report of all HCP Care Coordination <u>clients served</u> within the report period identified.</p> <p>Report 102 contains the following:</p> <ul style="list-style-type: none"> <li>• (B1) Total number of inactivated clients</li> <li>• (C1) Total number of activated clients (newly registered <u>clients served</u> within the report period)</li> <li>• (D1) Total number of Information Only encounters for the agency</li> <li>• (E1) Total number of Intake Interviews submitted (unique to the client, 1 count per client)</li> <li>• (F1) Total number of clients with an Assessment completed AND/OR Assessment reviewed (unique to the client, 1 count per client)</li> <li>• (G1) Total number of clients with a Plan of Care completed AND/OR Plan of Care reviewed (unique to the client, 1 count per client) <ul style="list-style-type: none"> <li>○ This is the total number of clients served or the total number of clients who received HCP Care Coordination services.</li> </ul> </li> <li>• (H1) Estimate of the total number of clients who will receive HCP Care Coordination services; based the agencies current fiscal year planning form.</li> </ul> <p><i>Please note: Report 102 is dedicated only to "clients served"; therefore only clients who have had the required Shared Plan of Care (either completed or reviewed) within the report period are included. Therefore, this report will not match the number of clients reported on Report 003.</i></p>



# FY17 CDS Report Listing - Detailed Description

## SPECIALTY CLINIC REPORTS

Report Name	Detailed Description
201 - HCP Specialty Clinic Schedule	<p>Report 201 provides a clinic schedule, by time slot, for clients who are to be seen at a given specialty clinic, with a given specialist, within the report date range identified.</p> <p>Report 201 contains the following:</p> <ul style="list-style-type: none"> <li>• Each client scheduled to be seen at a specialty clinic, for a given date, location, specialty, &amp; specialist</li> <li>• Appointment time</li> <li>• Patient Type (Returning or New)</li> <li>• DOB, Age, Interpreter Required</li> <li>• Insurance Type &amp; Number</li> <li>• Address</li> <li>• Gender</li> <li>• Clinic Location</li> <li>• Care Coordination provided (yes/no; if yes, Care Coordinator Name)</li> <li>• PCP Information</li> </ul>
202 - HCP Specialty Clinic Triage Listing	<p>Report 202 is a summary report of all HCP Specialty Clinic Clients who are currently being seen at an HCP specialty clinic. There is no date range for this report, so it is always a current list of all active specialty care clients who have not been discharged.</p> <p>Report 202 contains the following:</p> <ul style="list-style-type: none"> <li>• Pages separated by clinic type and specialist</li> <li>• Client name &amp; ID</li> <li>• Patient Type (Returning or New) - New clients highlighted in pink</li> <li>• DOB</li> <li>• Referral Date</li> <li>• Last Scheduled Visit Date, Clinic Location, Specialist seen</li> <li>• Outcome of last Appointment (Attended, Canceled, No-Show)</li> <li>• Follow-up Appointment Due Date</li> <li>• Diagnostic Tests required for next visit (CT, DME, EEG, Lab, MRI, PT, XRAY, Other)</li> </ul> <p><i>Please note: each client will only be listed on the triage listing one time. If the client needs to switch specialists and/or specialties, a new referral and/or appointment needs to be entered into CDS to move the client to the correct page.</i></p>
203 - HCP Specialty Clinic Visit Record	<p>Report 203 provides a PDF of the client's Visit Record for each client who has a specialty clinic appointment scheduled for a given specialty, specialist, and clinic location within the report date range identified.</p> <p><i>Please note: Information contained on the client's Visit Record should be reviewed by the client/parent/guardian upon check-in for their appointment. Any revisions or updates to the information should be made in CDS following the specialty clinic.</i></p>

# FY17 CDS Report Listing - Detailed Description

Report Name	Detailed Description
204 - HCP Specialty Clinic Medical History	<p>Report 204 provides a PDF of the client's Medical History form for each client who has a specialty clinic appointment scheduled for a given specialty, specialist, and clinic location within the report date range identified.</p> <p><i>Please note: The Medical History form should be completed by families upon check-in for their appointment. Any revisions or updates to the information should be made in CDS following the specialty clinic.</i></p>
205 - HCP Specialty Clinic Appointment	<p>Report 205 provides an Appointment Reminder Letter for each client who has a specialty clinic appointment scheduled for a given specialty, specialist, and clinic location within the report date range identified.</p> <p>The letter includes:</p> <ul style="list-style-type: none"> <li>• Specialist to be seen</li> <li>• HCP Specialty Clinic Location &amp; Address</li> <li>• Appointment Date &amp; Time</li> <li>• Clinic fee (if applicable)</li> <li>• List of items to bring to the appointment</li> </ul>